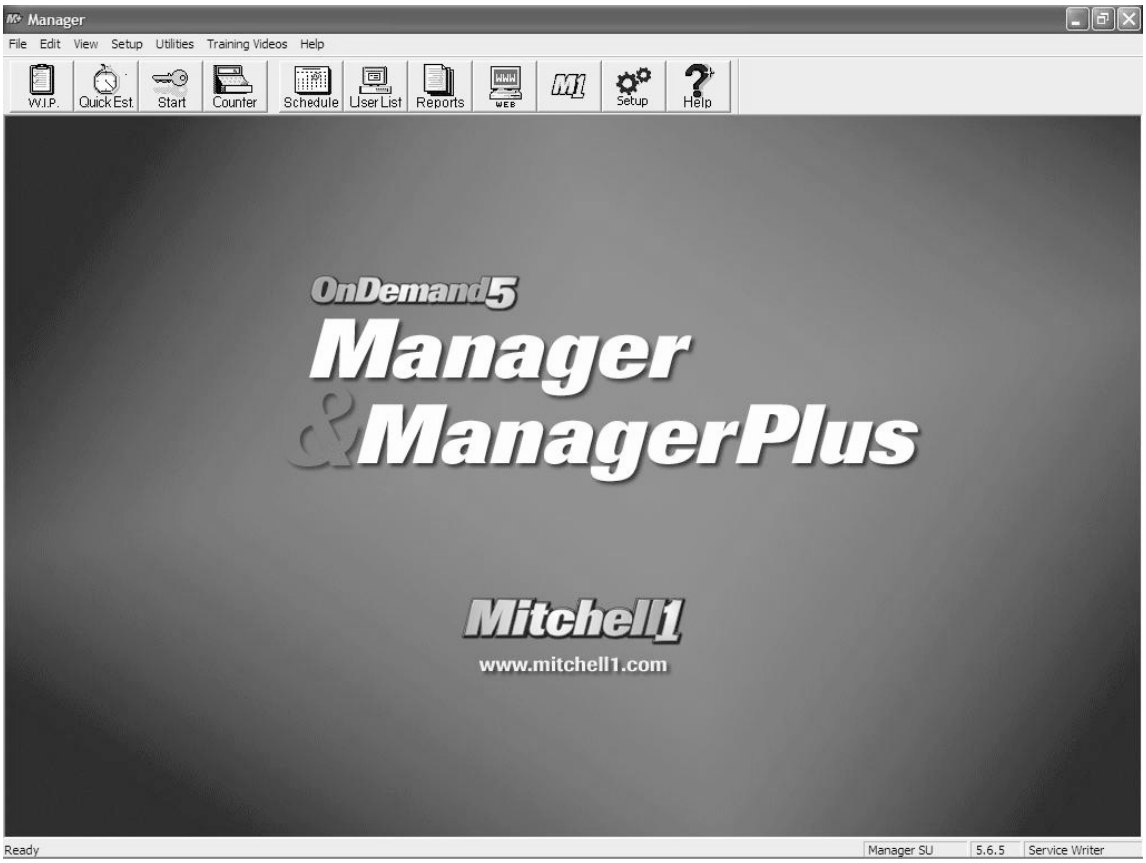


Putting Manager/ManagerPlus to Work

Setting up LIVE Manager to Match Your Business

Published by Mitchell 1
San Diego, CA

Copyright 2004 Mitchell Repair Information Company, LLC
All Rights Reserved

DISCLAIMER OF WARRANTIES: Although the information contained within this volume has been obtained from sources generally believed to be reliable, no warranty (expressed or implied) can be made as to its accuracy or completeness, nor is any responsibility assumed by Mitchell Repair Information Company or anyone connected with it for loss or damages suffered through reliance on any information contained in this volume. SPECIFICALLY, NO WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR ANY OTHER WARRANTY IS MADE OR TO BE IMPLIED WITH RESPECT TO THIS VOLUME AND ITS CONTENTS. In no event will Mitchell Repair Information Company be liable for any damages direct or indirect, consequential or compensatory, including, without limitation, lost profits, for any representations, breaches or defaults arising out of the use of this volume. Customer agrees to indemnify Mitchell Repair Information Company and hold it harmless against all claims and damages, including without limitation, reasonable attorney's fees arising out of the use of this volume, unless such claims or damages result from the infringement of any copyright or other proprietary right of any third party. This document contains confidential and trade secret information of Mitchell Repair Information Company. Any unauthorized reproduction, photocopy, or use of the information herein, in whole or in part, without the prior written approval of Mitchell Repair Information Company is prohibited.

Mitchell 1, OnDemand5, OnDemand5 Manager, and OnDemand5 ManagerPlus are trademarks of Mitchell Repair Information Company

Mitchell Management Solutions - Series I and II are trademarks of Mitchell Repair Information Company.

Microsoft Word, Access, and MS-DOS are registered trademarks of Microsoft Corporation.

Windows is a trademark of Microsoft Corporation.

Lotus and ScreenCam are registered trademarks of the Lotus Development Corporation.

Colorado Tape Backup is a trademark of Colorado Memory Systems.

ZIP is a registered trademark of Iomega Corporation.

Winzip is a registered trademark of Nico Mak Computing, Inc.

PKZIP is a registered trademark of PKWARE, Inc.

Any other trademarks or registered trademarks used herein are the property of their owners.

Published in the USA

Table of Contents

The Management Training & Setup Overview 1
Tips for a Better Software Launch Experience 1
Introduction 2

Section 1: Basic Rep-Assisted Setup Areas 3
BASICS: Shop Data 1 & 2 3
BASICS: Default Settings 4
BASICS: Shop/Hazmat 5
BASICS: Disclaimers 6
BASICS: Labor Rates 7
BASICS: Parts Discount Table 8
BASICS: Tax Rate 9
BASICS: Compound Taxes 9
BASICS: Income/Cash Accounts (Payment Types) 10
BASICS: Standard Accounts 11
BASICS: Account Classes (Revenue) 11
BASICS: Markup 12
Markup Percentage vs. Gross Profit 13
Parts Markup & Gross Profit Projections Table 14
BASICS: Price Markup Matrix 15
BASICS: Parts Pricing 16
BASICS: Technicians Setup 17
BASICS: Technicians Setup (Cont.) 18
BASICS: Reports/Printers 19
BASICS: Reports/Printers (Cont.) 20
BASICS: End of Day Reports 21
BASICS: Notes 21

Section 2: Self Setup Options 22
Screen View 22
Estimate/RO Validations & Invoice Validations 22
Late Fees 23
Category 24
Part Code 24
Phone 25
Title 25
Location 26
Status 26
Follow-up (Postcards, Letters and Mail-Merge) 27
Vendor Type 27

Symptoms 28
Program Security 29
Promotions: Packages & Discounts 29
Promotions: Tire Packages 30
Promotions: Brake Packages 31
Promotions: Lube, Oil & Filter Packages 32
Manufacturers (Line Codes) 33
Zip Code Mapping 33

Section 3: Get Ready, Get Set, Go LIVE 34

GET READY: Confirm Entry of Shop Information 34

Enter Customers & Vehicles 35
Enter Your Technicians 36
Enter Your Vendors 36
Enter Your Parts into Inventory List / Parts List 37
Build Your Own Parts Kits 38
Build Your Own Canned Jobs 38
Enter Your User Notes 38
Enter Your Additional Symptoms 39
Enter Your Promotions (Discounts & Packages) 39
Enter Your Location & Status Descriptions 39
Double Check Your Settings 40
Enter 2 Days of Invoices 41

GET SET: Final Countdown LIVE Checklist 42

GO: Set Starting Invoice 43

The Management Training & Setup Overview

1. **Get an Overview with Jumpstart Guide (#1)**
2. **Learn program basics in DEMO (book #2)**
    a. Rep Assisted Program Basics
    b. Self-Instruction of Additional Areas
    c. Watch Training Videos / Use F1 Help
3. **Prepare LIVE program with this book (#3)**
    a. Rep-assisted Setup of BASICS
    b. Self-Setup of Additional Settings
    c. **GET READY, GET SET, GO**! LIVE

You Are Now Here

Tips for a Better Software Launch Experience

- Copy the demo (training version) onto as many computers as you want! Shop personnel take to the program faster when they've had some relaxed time to get familiar with it. They can even use the CD to install demo at home.
- Don't rush it; the more you use the demo, the easier it gets. Depending on your schedule, it may take longer to achieve a comfort level, but your live experience will be better right away. Your time investment pays off later.
- Consider all program aspects carefully; a number of settings require a decision before going live. To change it later (after using live program for a while) may skew some reporting and results may be less than accurate.
- Take advantage of MANY keyboard shortcuts throughout program. If you learn these shortcuts, tasks are completed with reduced effort.

Putting Manager to Work is intended to compliment detailed program reference information in the User's Guide, located on the installation CD under 'View Documentation'.

TIP: Open the Users Guide (manager.pdf) file and select Save As and copy to your Desktop! This eliminates the need to have an installation CD loaded. The latest copy of the User's Guide may also be downloaded from

http://www.mitchellsupport.com/docs

Introduction

What Should I Do Next To Go LIVE With Management?

Now that you've learned the program's basic functions (book 2), you need to customize your software to match YOUR business. Before using it to create real estimates and orders, you must enter some basic information into it.

Save time and effort later by completing as much now, before "going live." This makes the software easier to use and it provides desired results faster.

This Go LIVE workbook consists of three main sections:

Section 1: BASIC rep-assisted setup areas

Basic setup includes: Default Settings, Labor Rate, Tax Rate, Income/Cash Accounts, Technicians, Reports & Printers, Markup and Markup Matrix, etc.

Section 2: Self setup that users complete for further customization

Self setup includes: Category, Part Codes, Location, Status, Followup, Packages, Symptoms, Screen View, Validations and Program Security.

Section 3: Final data entry / review settings checklist to go LIVE

GET READY: Review Program Setup and Task List

Put all your information into the program now; if you did this as you went through workbook parts 1 & 2 above, you're already there.

GET SET: Final Countdown LIVE Checklist

By now everything is setup according to plan for a successful launch.

GO! Set Starting Invoice # and Begin

This is the very last thing to do before going live.

Use space provided in this book or have program **Setup** open to each tab for entering your selections directly. This will allow you to finish and go LIVE sooner. Open **Setup** with this icon.

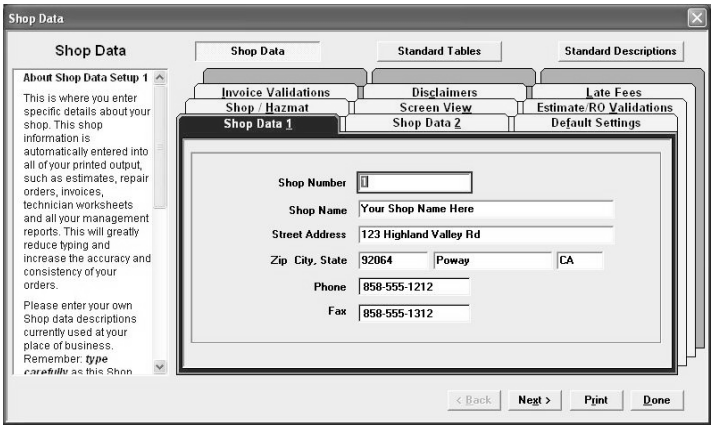
Note:
Be sure you're using the **live** program for all of these exercises. If it says Demo at the bottom of your screen, exit demo and click on Program icon.

Section 1: Basic Rep-Assisted Setup Areas

Your Sales Rep will assist you in these important setup activities. These activities must be completed before using Manager in your shop.

BASICS: Shop Data 1 & 2

This is where you enter your own shop specifics; these automatically appear in all printed output (estimates, repair orders, invoices, tech worksheets, management reports, etc). **Please enter Shop Data about your shop in spaces below.**


Shop Data
Shop Data
Shop Data
Standard Tables
Standard Descriptions
About Shop Data Setup 1
This is where you enter specific details about your shop. This shop information is automatically entered into all of your printed output, such as estimates, repair orders, invoices, technician worksheets and all your management reports. This will greatly reduce typing and increase the accuracy and consistency of your orders.
Please enter your own Shop data descriptions currently used at your place of business. Remember: type carefully as this Shop
Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Shop Number
1
Shop Name
Your Shop Name Here
Street Address
123 Highland Valley Rd
Zip City, State
92064
Poway
CA
Phone
858-555-1212
Fax
858-555-1312
< Back
Next >
Print
Done

Shop Name:

Street Address:

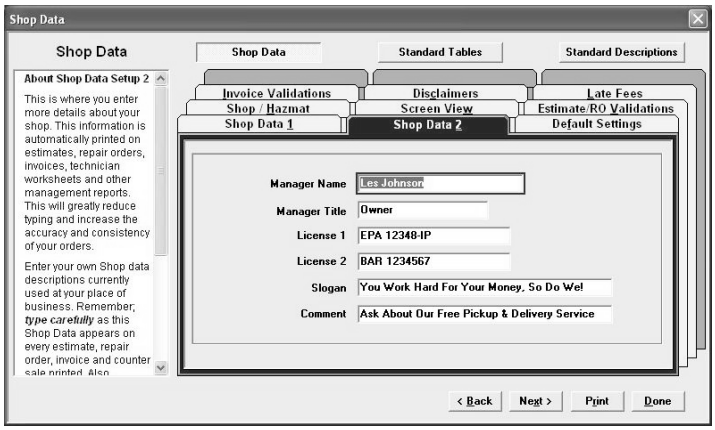
Zip/Postal Code:

City:

State/Prov:

Phone:

Fax:


Shop Data
Shop Data
Shop Data
Standard Tables
Standard Descriptions
About Shop Data Setup 2
This is where you enter more details about your shop. This information is automatically printed on estimates, repair orders, invoices, technician worksheets and other management reports. This will greatly reduce typing and increase the accuracy and consistency of your orders.
Enter your own Shop data descriptions currently used at your place of business. Remember; type carefully as this Shop Data appears on every estimate, repair order, invoice and counter
Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Manager Name
Les Johnson
Manager Title
Owner
License 1
EPA 12348-IP
License 2
BAR 1234567
Slogan
You Work Hard For Your Money, So Do We!
Comment
Ask About Our Free Pickup & Delivery Service
< Back
Next >
Print
Done

Manager Name:

Manager Title:

License 1:

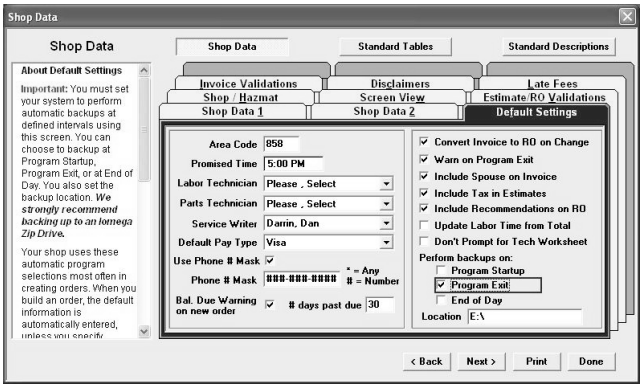
License 2:

Slogan:

Comment:

BASICS: Default Settings

Default Settings are automatic decisions for your shop. When you build an order, this default information is automatically entered for you.


Shop Data
Shop Data
Shop Data
Standard Tables
Standard Descriptions
About Default Settings
Important: You must set your system to perform automatic backups at defined intervals using this screen. You can choose to backup at Program Startup, Program Exit, or at End of Day. You also set the backup location. We strongly recommend backing up to an Iomega Zip Drive.
Your shop uses these automatic program selections most often in creating orders. When you build an order, the default information is automatically entered,
Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate RO Validations
Shop Data 1
Shop Data 2
Default Settings
Area Code 858
Promised Time 5:00 PM
Labor Technician Please , Select
Parts Technician Please , Select
Service Writer Darrin, Dan
Default Pay Type Visa
Use Phone # Mask
Phone # Mask ###-###-#### * = Any # = Number
Bal. Due Warning on new order
days past due 30
Convert Invoice to RO on Change
Warn on Program Exit
Include Spouse on Invoice
Include Tax in Estimates
Include Recommendations on RO
Update Labor Time from Total
Don't Prompt for Tech Worksheet
Perform backups on:
Program Startup
Program Exit
End of Day
Location E:\
< Back
Next >
Print
Done

Please enter your shop information in the spaces provided below.

Default Settings	Your Input or Recommend	Default Settings	Your input or Recommend
Area Code		**Convert INV to RO on Change**	☐ Yes
Promised Time	5:00 PM	**Warn on Program Exit**	☐ Yes
Labor Tech	Please, Select	**Incl. Spouse on Invoice**	☐ Yes
Parts Tech	Please, Select	**Incl. Tax in Estimates**	☐ Yes
Service Writer		**Incl. Recommendation on RO**	☐ Yes
Income Account	Cash Chk CC	**Update Labor Time From Total**	☐ Yes
Use Phone Mask	☐ Yes	**Don't Prompt: Tech Worksheet**	☐ No
Balance Due Warning	☐ Yes # of Days:	**Perform backups on Program:** (choose at least one)	☐ on Exit
		Locations (backup drive path)	(E:, etc)

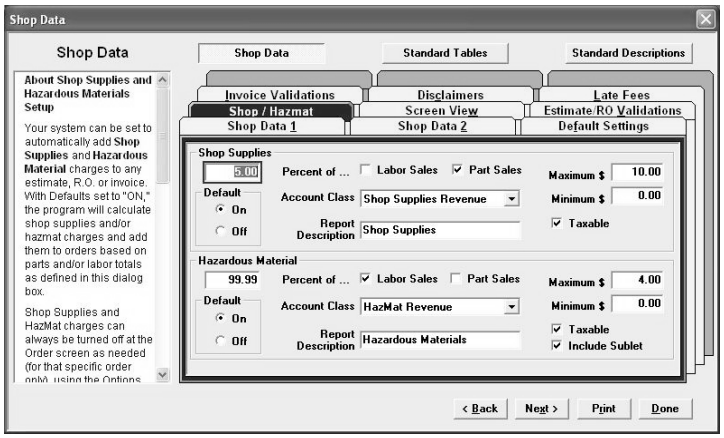
Note: We recommend entering 'Please Select' as Labor Tech, so Pay hrs & Actual hrs fill in automatically; also provides labor cost for F12 Profit Wizard.

You MUST backup the management program on a daily basis. To protect your business data assets, an Iomega Zip drive or USB Flash drive is best. We strongly recommend using more than one disk for data integrity.

We **DO NOT** recommend tape drives or CD-RW drives as they don't start automatically and may not perform as expected. ZIP drives and Flash drives are fast, easy to use and give everyone one less thing to worry about!

BASICS: Shop/Hazmat

Program can be set to automatically add **Shop Supplies** and **Hazardous Material** charges to any Estimate, Repair Order or Invoices created.



NOTICE: Some states require shops to itemize shop supplies. If so, we recommend turning Shop Supplies Default setting to **Off**, add shop supply line items as parts or a part kit to recover your legitimate shop costs and satisfy this legal requirement.

With Defaults 'ON', calculated shop supplies and/or hazmat charges are added to orders based on these settings. These charges can always be turned off at Order level (t*hat specific order only*), using Order Options.

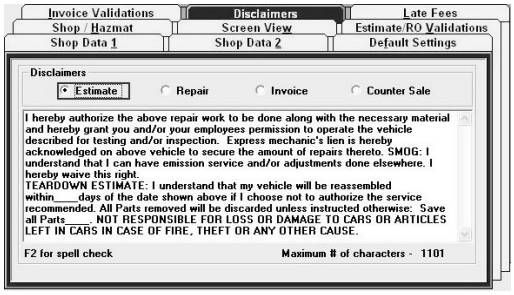
Shop Supplies	
% of Sales	**%**
Percent of …	**○ Labor Sales ○ Parts Sales**
Maximum $	**$**
Account Class	**Shop Supplies Revenue**
Report Description (Estimate/RO/Inv text)	**Shop Supplies**
Default Setting	**On Off**
Taxable	**Yes No**
Hazardous Materials	
% of Sales	**%**
Percent of …	**○ Labor Sales ○ Parts Sales**
Maximum $	**$**
Account Class	**HazMat Revenue**
Report Description (Estimate/RO/Inv text)	**Hazardous Materials**
Default Setting	**On Off**
Taxable	**Yes No**
Include Sublet (more dollars for calculations)	**Yes No**

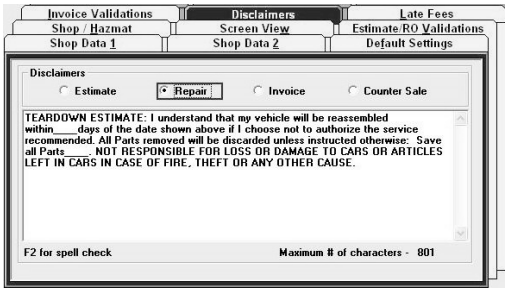
BASICS: Disclaimers

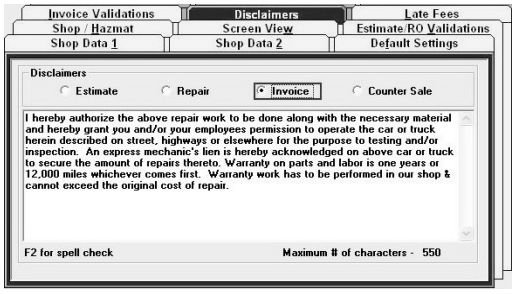
Disclaimers provide placeholders for your legal disclaimer information on Estimates, Repair Orders, Invoices and Counter Sales. These always appear at the bottom of your printouts. Please attach a clean, readable copy of a shop invoice to this page.

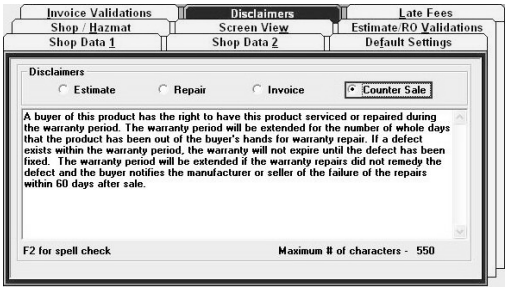
Your program comes with "generic" standard disclaimers. You can customize these or rewrite them entirely. For Spell Check function, press the **F2** key.

Note:
Ensure that all your disclaimers are written in accordance with your local, state and federal laws.


Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Disclaimers
Estimate
Repair
Invoice
Counter Sale
I hereby authorize the above repair work to be done along with the necessary material and hereby grant you and/or your employees permission to operate the vehicle described for testing and/or inspection. Express mechanic's lien is hereby acknowledged on above vehicle to secure the amount of repairs thereto. SMOG: I understand that I can have emission service and/or adjustments done elsewhere. I hereby waive this right.
TEARDOWN ESTIMATE: I understand that my vehicle will be reassembled within____days of the date shown above if I choose not to authorize the service recommended. All Parts removed will be discarded unless instructed otherwise: Save all Parts____. NOT RESPONSIBLE FOR LOSS OR DAMAGE TO CARS OR ARTICLES LEFT IN CARS IN CASE OF FIRE, THEFT OR ANY OTHER CAUSE.
F2 for spell check
Maximum # of characters - 1101


Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Disclaimers
Estimate
Repair
Invoice
Counter Sale
TEARDOWN ESTIMATE: I understand that my vehicle will be reassembled within____days of the date shown above if I choose not to authorize the service recommended. All Parts removed will be discarded unless instructed otherwise: Save all Parts____. NOT RESPONSIBLE FOR LOSS OR DAMAGE TO CARS OR ARTICLES LEFT IN CARS IN CASE OF FIRE, THEFT OR ANY OTHER CAUSE.
F2 for spell check
Maximum # of characters - 801

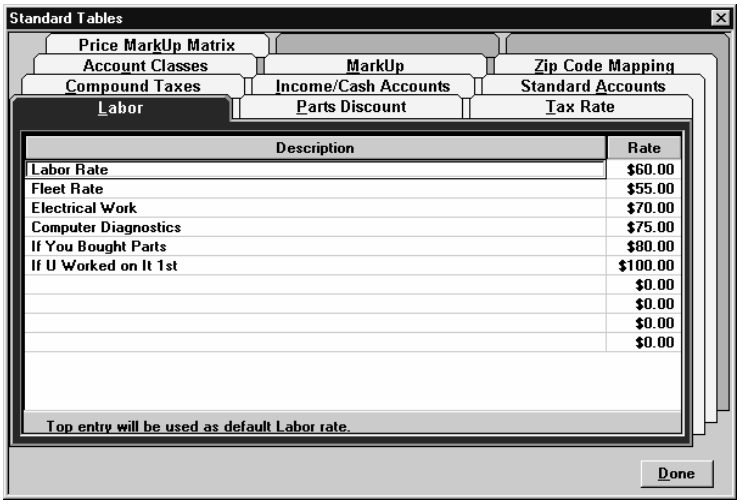

Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Disclaimers
Estimate
Repair
Invoice
Counter Sale
I hereby authorize the above repair work to be done along with the necessary material and hereby grant you and/or your employees permission to operate the car or truck herein described on street, highways or elsewhere for the purpose to testing and/or inspection. An express mechanic's lien is hereby acknowledged on above car or truck to secure the amount of repairs thereto. Warranty on parts and labor is one years or 12,000 miles whichever comes first. Warranty work has to be performed in our shop & cannot exceed the original cost of repair.
F2 for spell check
Maximum # of characters - 550


Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Disclaimers
Estimate
Repair
Invoice
Counter Sale
A buyer of this product has the right to have this product serviced or repaired during the warranty period. The warranty period will be extended for the number of whole days that the product has been out of the buyer's hands for warranty repair. If a defect exists within the warranty period, the warranty will not expire until the defect has been fixed. The warranty period will be extended if the warranty repairs did not remedy the defect and the buyer notifies the manufacturer or seller of the failure of the repairs within 60 days after sale.
F2 for spell check
Maximum # of characters - 550

BASICS: Labor Rates

Labor Table stores up to 10 different shop labor rates for use.

Customers can be defined with any of these labor rates as default for their estimates, orders & invoices. That's less to remember every time!



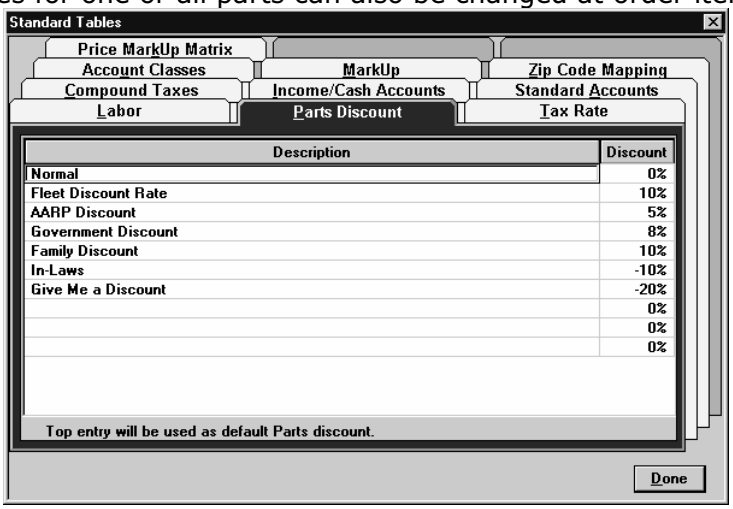
Note:
Line 1 is always the default Labor Rate and is added automatically unless you choose otherwise.

Please enter Labor Rates currently used in table below.

Labor Rate Table	
Labor Rate Descriptions	**Labor Rate ($ per hr)**
1. (Default) Labor Rate	**$**
2.	**$**
3.	**$**
4.	**$**
5.	**$**
6.	**$**
7.	**$**
8.	**$**
9.	**$**
10.	**$**

BASICS: Parts Discount Table

Parts Discount allows storage of up to 10 levels of discounts. Parts entered on an estimate or RO reflect any discount defined in customer **Type**. Prices for one or all parts can also be changed at order item level.



Notes:
Keep value on Line #1 at 0%, or you could end up with automatic discount on every part you sell. Negatives values (ex. -10%) will instead add percentage to normal parts charge.

Tip:
In addition to defining Discount level for customer, these values work with **Alternate Price**, found within part records in your Parts List or Inventory List.

Please enter your Parts Discount (if any) in the table below.

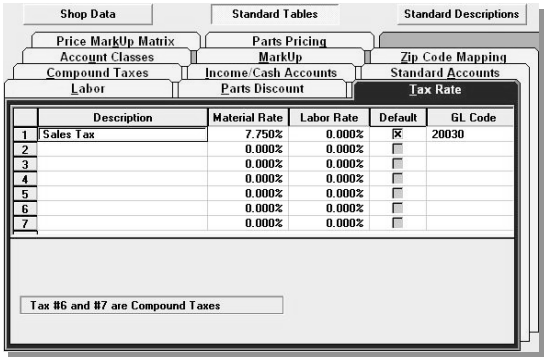
Parts Discount Description	Discount %
1. Normal (Default)	**0% (#1 = always zero)**
2.	**%**
3.	**%**
4.	**%**
5.	**%**
6.	**%**
7.	**%**
8.	**%**
9.	**%**
10.	**%**

BASICS: Tax Rate

Tax Rate Table allows you to maintain up to seven different tax rates. Most shops have only one. Line 1 should have 'X' in Default.

Note:
Line 1 is the default tax value. This is the global tax setting program will apply. Use **Tax** button on the Customer or Vehicle screens to make exceptions. Each Order item (part, labor, etc) has **Tax** button.

Compound Taxes (Canadian) PST-GST is added using #6 and #7.



Note: Program ships with Tax flag **on**. Tax will be **0%** until you enter current tax rate. You can change any customer to non-tax status later.

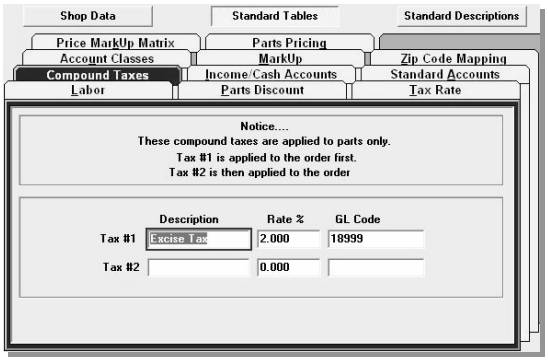
Please enter the Tax Rate(s) you currently use below.

Tax Rate Description	Material Rate	Labor Rate	Default
1. Sales Tax	**%**	**%**	☒
2.	**%**	**%**	

BASICS: Compound Taxes

Compound Taxes Table allows you to set up compound or excise taxes if you are required to do so. This might be tires with an Excise Tax as percentage. If the tire tax is flat amount, create a 'tax part' and use Attached Part method.

Note:
In most shops, only the standard Tax Rate Table (above) is used.



Please enter your Compound Tax rates (if any) in the table below.

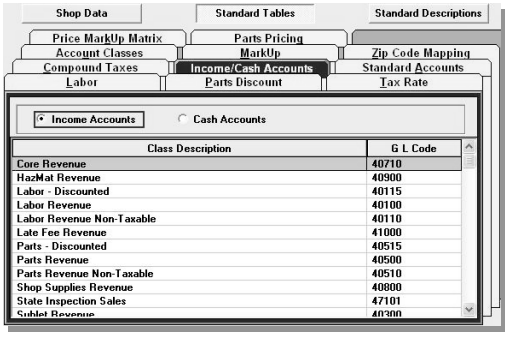
Description	Rate %	GL Code
Tax #1		
Tax #2		

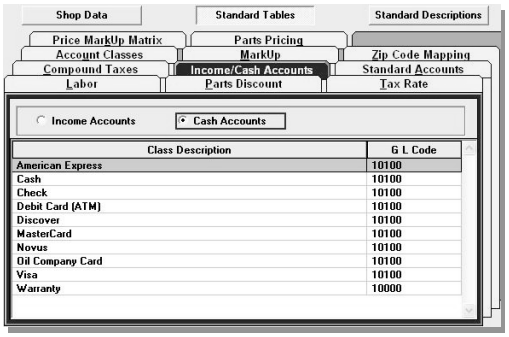
BASICS: Income/Cash Accounts (Payment Types)

Income Accounts are the General Ledger (GL) account numbers where revenues are grouped for accounting purposes. Be sure these accounts are setup accurately before going LIVE.

Cash Accounts are various forms of payment from a customer. This is where you would add a credit card, debit card, any new payment type.

You may add/edit/delete these codes and descriptions in the table below.





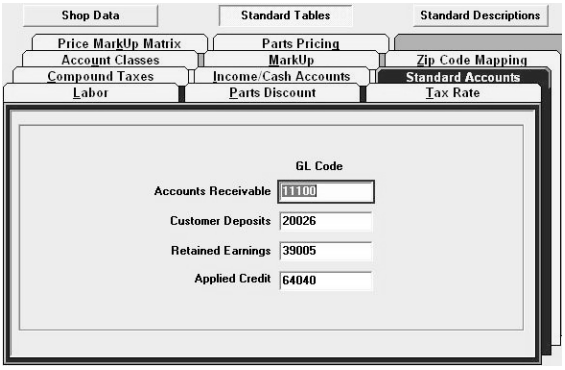
Note:
In program terminology, Cash refers to any payment by cash, credit card, check, etc. In other words, this is any payment to an order balance other than a charge to a customer's in-house credit account. This area is used with numerous built-in Accounting Reports.

Please edit/add any additional Income or Cash Account(s) below.

Income Accounts	Cash Accounts (Payment Types)
Parts Revenue	**Cash**
Parts Revenue – Non-Taxable	**Check**
Labor Revenue	**Visa**
Labor Revenue – Non-Taxable	**MasterCard**
Late Fees *(*ADD if using Late Fees)*	**Discover**
Shop Supplies Revenue	**American Express**
HazMat Revenue	**Charge**
Sublet Revenue	**ATM /Debit Card**
Sublet Revenue – Non-Taxable	**BP/Amoco Card**
Towing	
Warranty	
State Inspection Fees	
Tire Disposal Fee	

BASICS: Standard Accounts

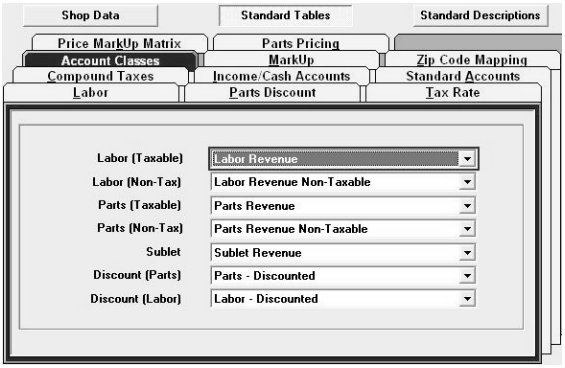
Standard Accounts is where you enter general ledger codes for Accounts Receivable, Customer Deposits, and Retained Earnings. Most shops will use the default values.



Note:
Changes made later will affect the accuracy of your reports.

BASICS: Account Classes (Revenue)

Account Classes area allows the selection of which accounts the shop invoice revenues will flow into.



Note:
In most shops, these account class assignments typically match the descriptions in the default list created in Income/Cash Accounts section. (Please refer to next page)

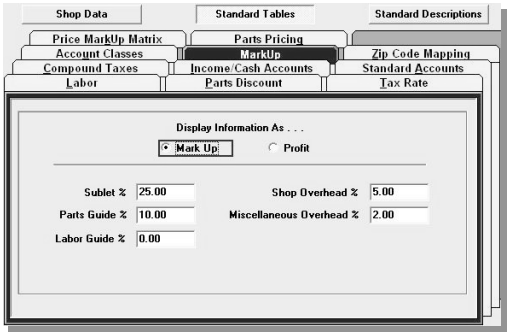
Please review suggested selections shown here, noting any changes you'd make to your specific system.

It would be necessary to return to Income Cash Accounts to create any special account(s) to appear in the drop-down lists seen here in Account Classes.

BASICS: Markup

In **Markup**, you can enter your shop's Markup percentages. In the sample shown, a Sublet item of $50 cost is being marked up 25% to automatically bill out at $62.50.

You can also markup **OE** Parts and Labor transferred from Estimating Module (if installed). An OEM part with $100 list would transfer into an estimate as $110 (@10% Markup). Labor hrs would transfer at face value. (adding 10% on a 1.0 hr item would result in 1.1 hrs)



Note: Shop Overhead % + Misc. Overhead % do not directly affect prices on orders. These are used only to give the Profit Wizard realistic numbers to reflect your true cost of doing business.

Business Tip:
See **Markup Percentage vs. Gross Profit** discussion on following page for a story about the contrast between these two very different approaches.

Please enter your Markup and Overhead percentages below.

You may enter them as either Markup % OR Profit %. Whichever method you select, the matching values calculate automatically.

Please refer to Markup Matrix topic for aftermarket catalog parts.

	Markup %	Profit %
Sublet %		
Parts Guide %		
Labor Guide %		
Shop Overhead %		
Miscellaneous Overhead %		

What is the Difference between Markup percent vs. Gross Profit?

Continue on to the next page where we've provided an example story, illustrating the difference between Markup Percentage and Gross Profit.

Markup Percentage vs. Gross Profit

Act I: Markup Part by Percentage

- Joe the owner buys an alternator for $100 and wants to "mark it up" 40%.
- Joe's selling price for the alternator is now "marked up" to $140.
- Joe is convinced that this 40% Markup is "*fair*" to his customers.

Part Cost	Markup Percentage	Retail Selling Price
$100	**40%**	**$140**

Act II: Discounting "Marked Up" Parts

- Joe's best customer Bill needs to buy that same $140 alternator. Bill gets a 30% discount on his parts. (hefty discount with company fleet business)
- Joe discounts the $140 retail-selling price by 30% and takes off $42.
- Joe doesn't realize that he is selling the part ($100 cost) for $98 ($2 less than what he paid). Instead of still making 10% on the part, he lost 2%.

Question: *Is this why Joe has a hard time making ends meet?*

Retail Selling Price	Bill's Discount	Joe's Discount Price
$140	**30% (-$42)**	**$98($2 net loss)**

Act III: Using Gross Profit to Determine Retail Selling Price

- Joe, the shop owner/service writer, wants to make a 40% gross profit on every part he sells.
- To do this, Joe must add 66% to his cost on the alternator and sets the retail-selling price at $166.

Part Cost	% Added to Cost	Retail Price	Gross Profit
$100	**66%**	**$166**	**40%**

Act IV: Discounting After Using Proper Gross Profit

- Ben comes into the shop and needs to buy that same alternator. Loyal customer Ben gets a 30% discount on his parts.
- Joe discounts the $166 selling price by 30% and takes $49.80 off the retail-selling price.
- Joe's not making much money this time, but at least he isn't losing any money selling the alternator to Ben at a 30% discount.

Retail Selling Price	Discount %	Discounted Price
$166	**30% (-$49.80)**	**$116.20**

Parts Markup & Gross Profit Projections Table

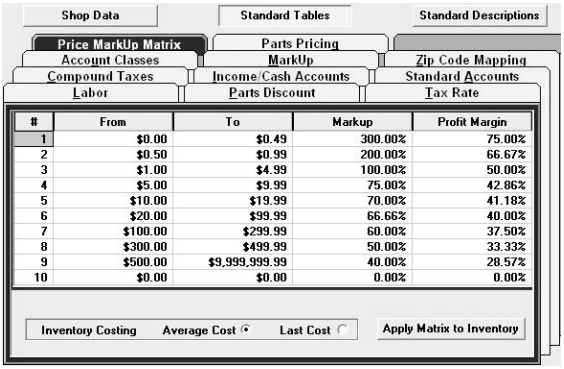
% Added to Cost of Part	Gross Profit Part Sale	% Added to Cost of Part	Gross Profit Part Sale	% Added to Cost of Part	Gross Profit Part Sale
30%	23.1%	50%	33.3%	70%	41.2%
31%	23.7%	51%	33.8%	75%	42.9%
32%	24.2%	52%	34.2%	80%	44.4%
33%	24.8%	53%	34.6%	85%	45.9%
34%	25.4%	54%	35.1%	90%	47.4%
35%	25.9%	55%	35.5%	95%	48.7%
36%	26.5%	56%	35.9%	100%	50%
37%	27.1%	57%	36.3%	125%	55.6%
38%	27.5%	58%	36.7%	150%	60%
39%	28.1%	59%	37.1%	175%	63.6%
40%	28.6%	60%	37.5%	200%	66.6%
41%	29.1%	61%	37.9%	225%	69.2%
42%	29.6%	62%	38.2%	250%	71.4%
43%	30.1%	63%	38.6%	275%	73.3%
44%	30.6%	64%	39%	300%	75%
45%	31.0%	65%	39.4%	325%	76.5%
46%	31.5%	66%	39.8%	350%	77.8%
47%	32.0%	67%	40.1%	375%	78.9%
48%	32.4%	68%	40.5%	400%	80%
49%	32.9%	69%	40.8%	500%	83.3%

Markup is the *percentage of the amount you earn on the cost* of an item to you. This is your Markup on part cost.

Gross Profit is the percentage of the amount you earn on the selling price of the item. Gross profit tells you what you retain on each sales dollar.

BASICS: Price Markup Matrix

Price Markup Matrix allows you to scale parts markup according to what you paid for each part. In other words, parts that cost less than a dollar are marked up at much higher rate than a part that costs $100. We recommend using several levels to remain both profitable & competitive.



#	From	To	Markup	Profit Margin
1	$0.00	$0.49	300.00%	75.00%
2	$0.50	$0.99	200.00%	66.67%
3	$1.00	$4.99	100.00%	50.00%
4	$5.00	$9.99	75.00%	42.86%
5	$10.00	$19.99	70.00%	41.18%
6	$20.00	$99.99	66.66%	40.00%
7	$100.00	$299.99	60.00%	37.50%
8	$300.00	$499.99	50.00%	33.33%
9	$500.00	$9,999,999.99	40.00%	28.57%
10	$0.00	$0.00	0.00%	0.00%

Changes made to the matrix can be applied to parts by clicking on **Apply Matrix**.

In Manager Plus, you have capability of using Last Cost or Average Cost. This is significant because:

1) Inventory parts can be set to transfer with either average cost or last cost applied. This makes a difference on invoice profitability reporting.

2) Last cost may place part into a different (higher) bracket and receive a different (smaller) markup than expected.

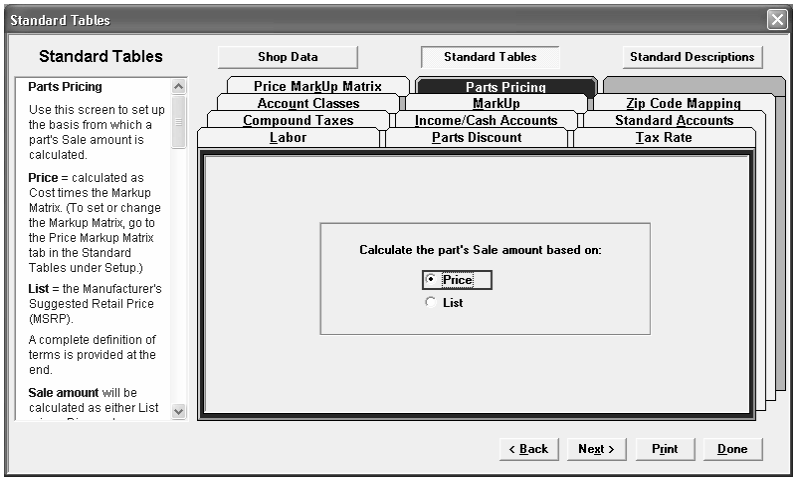
Please enter your own Markup or Margin selections below.

Price Markup Matrix				
Range	**From**	**To**	**Markup**	**Profit Margin**
1.	**$0.00**	**$**	%	%
2.	**$**	**$**	%	%
3.	**$**	**$**	%	%
4.	**$**	**$**	%	%
5.	**$**	**$**	%	%
6.	**$**	**$**	%	%
7.	**$**	**$**	%	%
8.	**$**	**$**	%	%
9.	**$**	**$**	%	%
10.	**$**	**$**	%	%

BASICS: Parts Pricing

Use this screen to set up the basis from which a part's Sale amount is calculated.

Price = calculated as Cost times the Markup Matrix. (setup in previous section.)
List = the Manufacturer's Suggested Retail Price (MSRP).


Standard Tables
Standard Tables
Shop Data
Standard Tables
Standard Descriptions
Parts Pricing
Use this screen to set up the basis from which a part's Sale amount is calculated.
Price = calculated as Cost times the Markup Matrix. (To set or change the Markup Matrix, go to the Price Markup Matrix tab in the Standard Tables under Setup.)
List = the Manufacturer's Suggested Retail Price (MSRP).
A complete definition of terms is provided at the end.
Sale amount will be calculated as either List
Price MarkUp Matrix
Parts Pricing
Account Classes
MarkUp
Zip Code Mapping
Compound Taxes
Income/Cash Accounts
Standard Accounts
Labor
Parts Discount
Tax Rate
Calculate the part's Sale amount based on:
Price
List
< Back
Next >
Print
Done

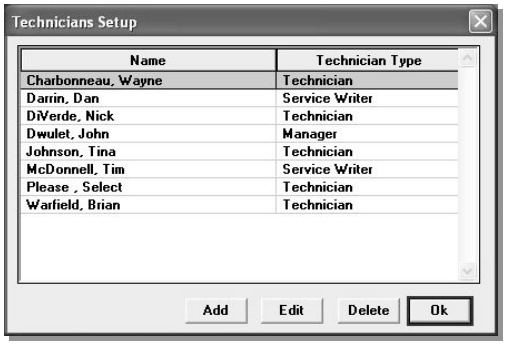
When the radio button selection is changed, the rules for the new selection will go into effect. The new rules will apply to newly created Estimates and Repair Orders. The new rules will not affect Estimates, Repair Orders, or Invoices created prior to this change. If a prior order is opened and a part's line item is edited or added, the new rules will apply only to that part's line item. When a part from a canned job, parts kit, or inventory (ManagerPlus only) are added to an order, the part's Sale amount will reflect the current rules.

The program will attempt to ensure you don't end up with a Sale amount of zero. If you chose to calculate Sale based on List and no List amount has been entered for the part, the program will use the Price to calculate the Sale amount. If you chose to calculate Sale based on Price and no Price amount has been entered for the part, the program will use the List amount. Refer to the User Guide and Online Help for more detailed information/definitions.

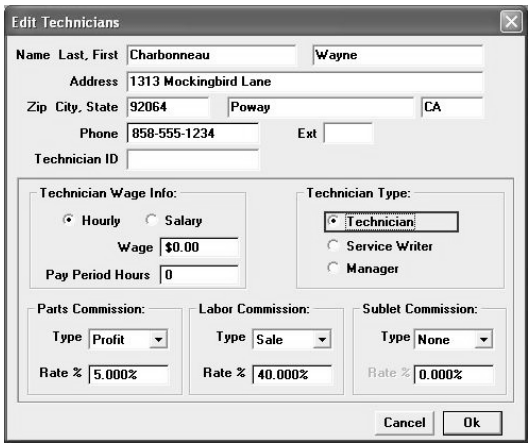
BASICS: Technicians Setup

Technicians Setup allows you to add, edit or delete Technician (employee) information. We have supplied room on the following page to write in information for two technicians. Enter data for two technicians here and any remaining technicians as part of your Get Ready task list to go LIVE.

Technician Setup information provides the basis for the Technician Commission Report. It also helps you figure out your shop's profit margin on a job with the **F12** Profit Wizard.



Note:
Some employees may require more than one entry. If a service writer-manager occasionally gets a labor commission for work, he would be setup twice; once as a Tech and again as Service Writer-Manager.



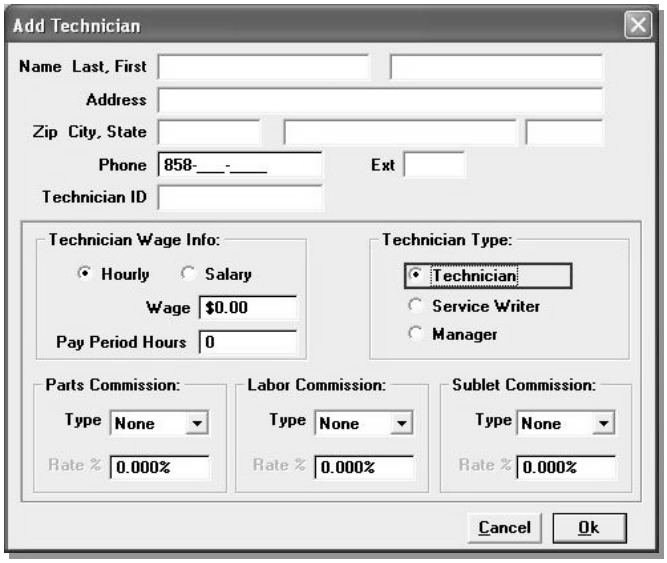
On the next page, blank Add Technician screens are provided for you to pencil in information for adding details for two technicians.

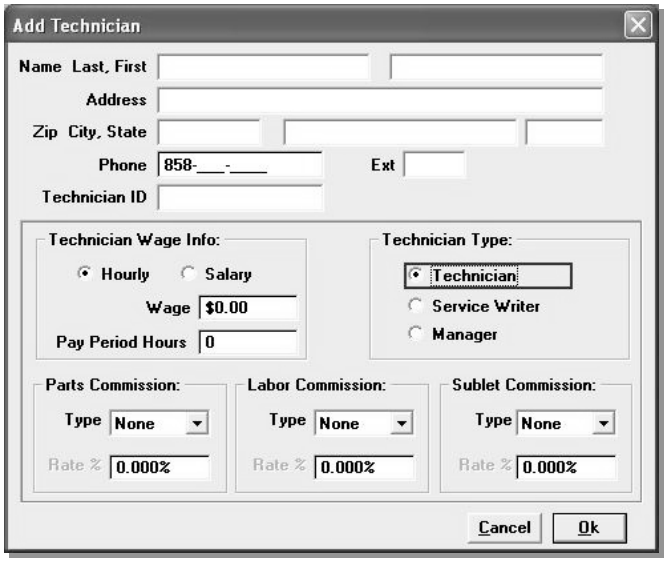
BASICS: Technicians Setup (Cont.)

Enter two technicians now and any remaining technicians later, during your Get Ready checklist at the end of the book.

You may also enter your technician data directly into your program now.

Note:
"Type" is selection of commission type for the technician on Sale (total $), Profit on a job or none.





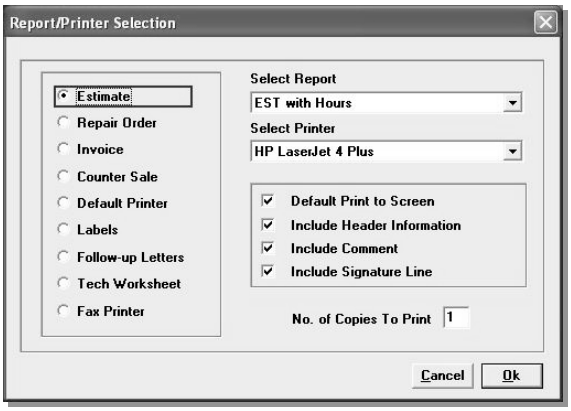
Reports/Printers area defines which style of printout, printer used and how many copies to print. Default Print to Screen provides a preview.

If Default to Screen (Preview) is used, it will be necessary to manually increase print quantities above one copy. Once users are comfortable with the program, you may turn Default to Screen off. Program will then automatically print the quantity requested in Reports/Printers setup.

Report/Printers - Estimates

Select the printer and report type to complete your selections.

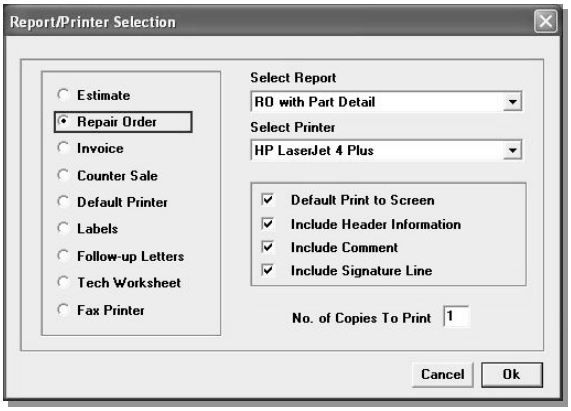
Mitchell recommends printing two estimate copies; for both customer and shop and two invoice copies (customer and file).



Report/Printers - Repair Orders

Select the printer and report type to complete your selections.

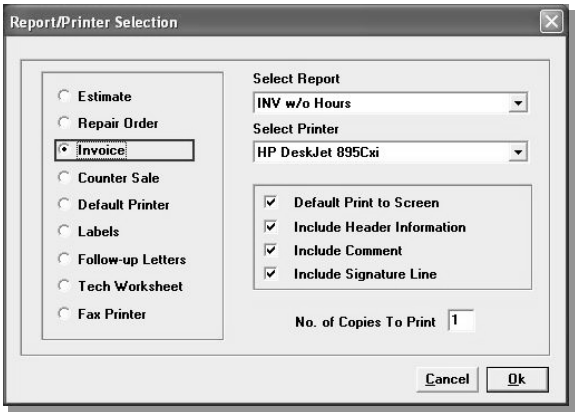
Microsoft® Windows™ will provide default printer automatically, but you may select different printers for the various types of reports.



Report/Printers - Invoice

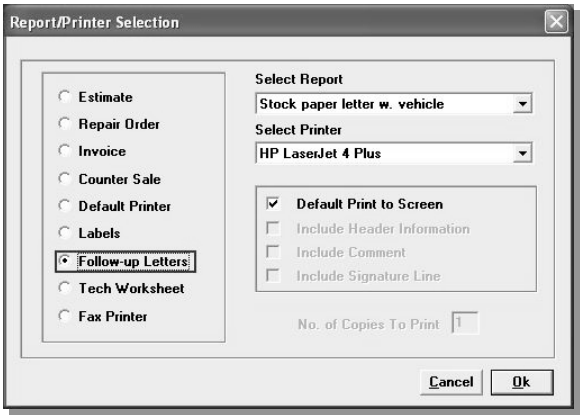
Select the printer and report type to complete your selections.

Mitchell recommends printing two invoice copies; for customer and shop's file.



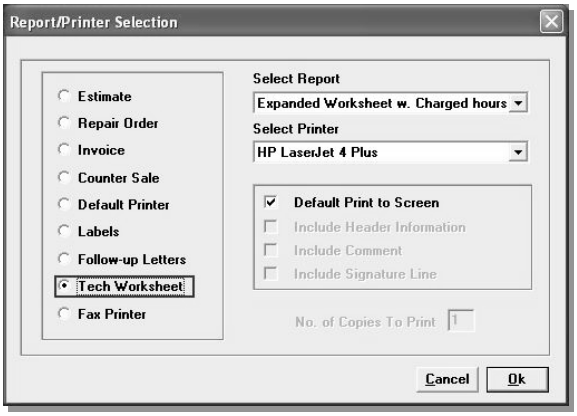
Report/Printers – Labels

Select the printer and report type to complete your selections.



Report/Printers – Technician Worksheet

Select the printer and report type to complete your selections.



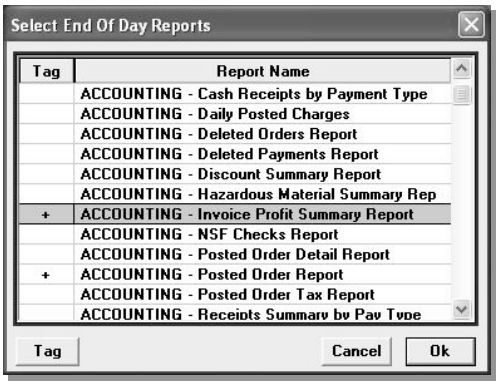
Repeat this process for your **Counter Sale, Default Printer, Labels** and **Fax Printer** (all not shown here) as needed.

BASICS: End of Day Reports

The **End of Day Reports** setup is where you select which reports will be run automatically (as batch operation) at the end of your business day. The example below has several reports "tagged" to be run at closing time.

This batch operation saves precious time at the end of every business day. Additional reports may be run from the Reports icon at any time.

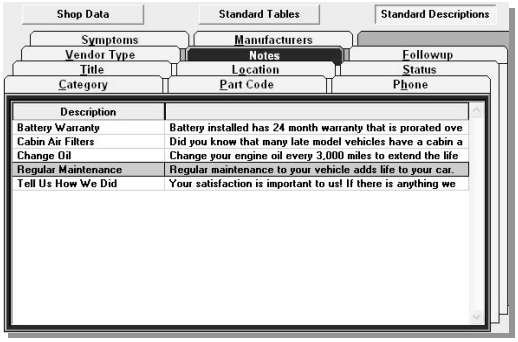
Consider which reports you want to run on a daily basis. Then select or de-select your reports by highlighting each line and clicking on the Tag button or double-click on highlighted line.


Select End Of Day Reports
Tag
Report Name
ACCOUNTING - Cash Receipts by Payment Type
ACCOUNTING - Daily Posted Charges
ACCOUNTING - Deleted Orders Report
ACCOUNTING - Deleted Payments Report
ACCOUNTING - Discount Summary Report
ACCOUNTING - Hazardous Material Summary Rep
+ ACCOUNTING - Invoice Profit Summary Report
ACCOUNTING - NSF Checks Report
ACCOUNTING - Posted Order Detail Report
+ ACCOUNTING - Posted Order Report
ACCOUNTING - Posted Order Tax Report
ACCOUNTING - Receipts Summary by Pay Type
Tag
Cancel
Ok

Note:
When using LIVE program, you'll trigger End of Day Reports process by clicking on **Utilities** and selecting **End of Day Reports**.

BASICS: Notes

Time-saving **Notes** will attach to orders with just a mouse click. These notes are helpful reminders to customers or direct advertising about special discounts or stored list of your **Recommendations**!



Note:
Program comes with some notes already prepared. Enter Notes into program now or add some later.

This concludes rep-assisted setup. Refer back to training checklist for other items then continue on with Self Setup.

Section 2: Self Setup Options

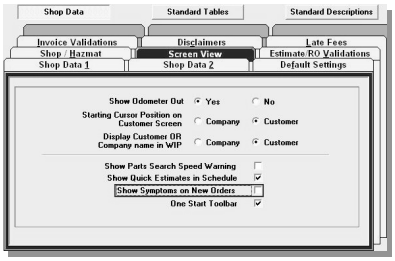
Although you've worked through the basics with your rep, you should continue working through the following section for maximum benefits from your program.

Screen View

Screen View is another way to customize what you can see or how the program works.

Show Symptoms on New Orders will make a Symptoms screen pop-up display when you start a new order.

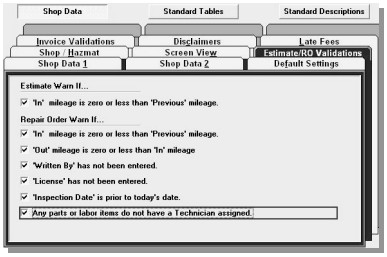
One Start Toolbar creates the (**F6**) Start icon to start Estimates and Repair Orders faster.

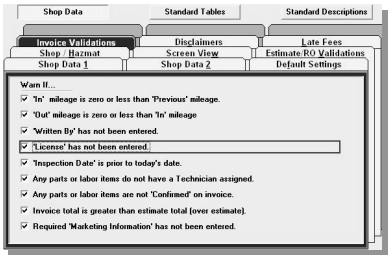


Screen View	Recommended
Show Odometer Out	**Yes** **No**
Starting Cursor Position on Customer Screen	**Company** **Customer**
Display Customer - Company Name in WIP Screen	**Company** **Customer**
Show Parts Search Speed Warning	**Yes** **No**
Show Quick Estimates in Schedule	**Yes** **No**
Show Symptoms on New Orders	**Yes** **No**
One Start Toolbar	**Yes** **No**

Estimate/RO Validations & Invoice Validations

When you print an estimate, repair order or an invoice, software uses **Validations** to checks for missing information. You'll see a warning and dialog box to enter that information quickly and then proceed to print.


Shop Data
Standard Tables
Standard Descriptions
Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Estimate Warn If...
'In' mileage is zero or less than 'Previous' mileage.
Repair Order Warn If...
'In' mileage is zero or less than 'Previous' mileage.
'Out' mileage is zero or less than 'In' mileage
'Written By' has not been entered.
'License' has not been entered.
'Inspection Date' is prior to today's date.
Any parts or labor items do not have a Technician assigned.

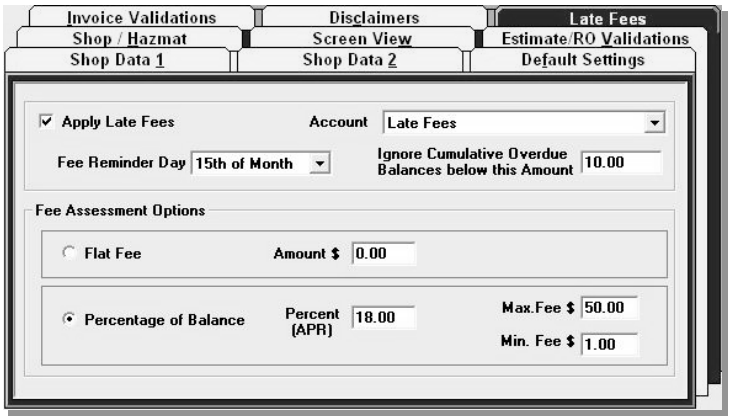

Shop Data
Standard Tables
Standard Descriptions
Invoice Validations
Disclaimers
Late Fees
Shop / Hazmat
Screen View
Estimate/RO Validations
Shop Data 1
Shop Data 2
Default Settings
Warn If...
'In' mileage is zero or less than 'Previous' mileage.
'Out' mileage is zero or less than 'In' mileage
'Written By' has not been entered.
'License' has not been entered.
'Inspection Date' is prior to today's date.
Any parts or labor items do not have a Technician assigned.
Any parts or labor items are not 'Confirmed' on invoice.
Invoice total is greater than estimate total (over estimate).
Required 'Marketing Information' has not been entered.

Note: By default, ALL validations are automatically enabled. We recommend leaving all of these warnings turned on, unless you have a specific reason not to use any validation(s). If any of these pop-up, pressing Enter allows users to continue on to the printing process.

Late Fees

Late Fees option provides users with a method to automatically calculate late charges for customer charge accounts. Once you've read the important NOTICE below, place a check in **Apply Late** Fees to activate and begin setup process.

Tip: Be sure to watch the Late Fee training video to see how to setup the Account Class Revenue for Late Fees to appear for selection below in drop-down list.



NOTICE: Before enabling this feature, you must consult local and state regulations regarding late fee practices. Please be advised that Mitchell 1 is not responsible for ensuring your compliance with state and/or other law regarding the assessment of late fees or other interest charges on outstanding invoice amounts. Mitchell 1 will not be held accountable for any misuse and/or failure to comply and will not be responsible for any consequential financial or legal implications.

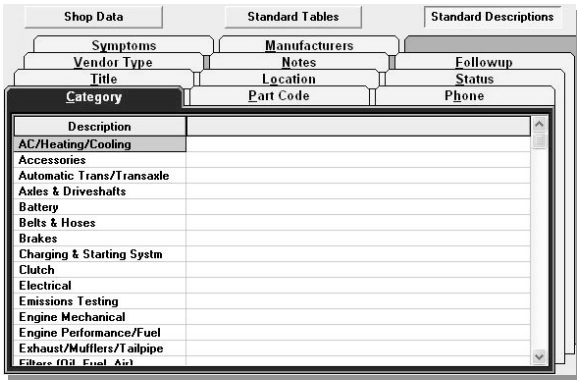
Late Fee Setup Values	
Account	**Late Fees**
Fee Reminder Day	**None 1st 15th**
Ignore Cumulative Overdue Balances if Below This Amount	**$**
Fee Assessment Options	**Flat Fee or % of Balance**
Amount	**Fee $ APR %**
Maximum Fee	**$**
Minimum Fee	**$**

Category

Category descriptions are helpful to organize and filter parts & labor items for faster access when estimating.

Categories also make reports more meaningful and easier to read. Shops can use these to track which job categories are profitable or not.

Use the sample Categories, edit them or delete them.



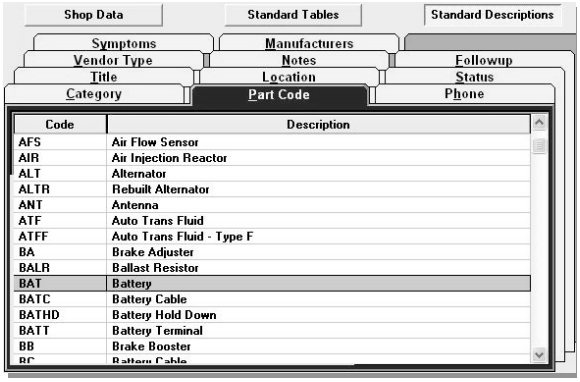
Add your own Category Descriptions below or directly into program.

Category Descriptions (Write in Your New Categories, if any)	

Part Code

Part Codes are abbreviations to help you enter parts faster. When adding a part to an estimate, by typing **BAT** into Part Code, the Description (**Battery**) fills automatically. Part Codes can also be set to fill in the related Category and Vendor information.

Note:
Program comes pre-loaded with many Part Codes. Two reports are provided to display existing Part Codes with descriptions.

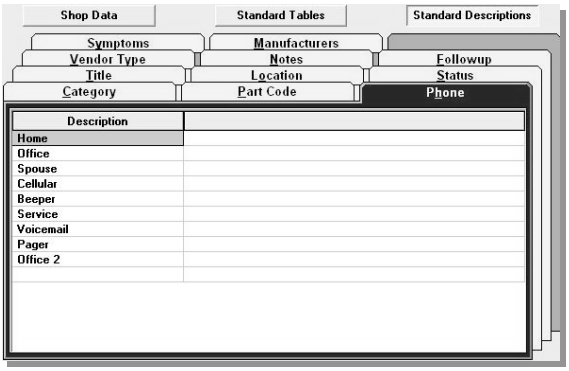


Add your own Part Codes (if any) directly into the program.

Phone

Phone stores 10 different Phone Descriptions labels. These allow you to handle customers who may have multiple phone locations.

The program comes loaded with all the descriptions you are most likely to use. We recommend leaving them exactly as they appear here.



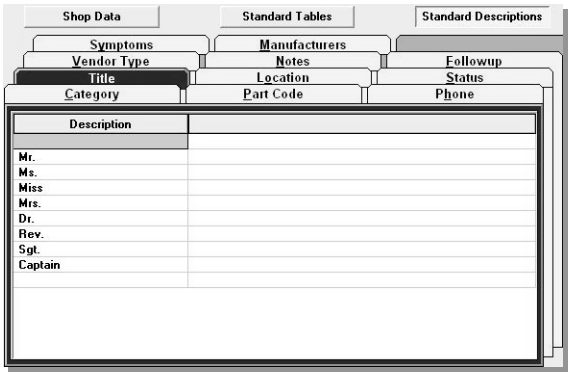
Warning!

Do NOT change or re-arrange these once customer phone numbers have been entered. You risk mixing up these labels as to which phone numbers they truly belong to.

Title

Title descriptions allow you to create or remove standard salutations for customers. The program doesn't require you to enter titles for your customers. This is optional.

Program comes with a list of Title descriptions. For most customers, provided Titles work fine. You can edit or delete Title descriptions as necessary.

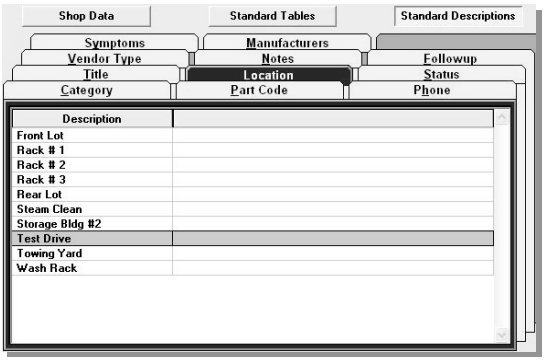


Be sure to leave the first line in this table blank.

Location

Location descriptions are used to help keep track of where vehicles are located at your business. These can be very important to a large shop with multiple parking areas.

You can add/edit/delete descriptions of common vehicle locations in or around your shop at any time.

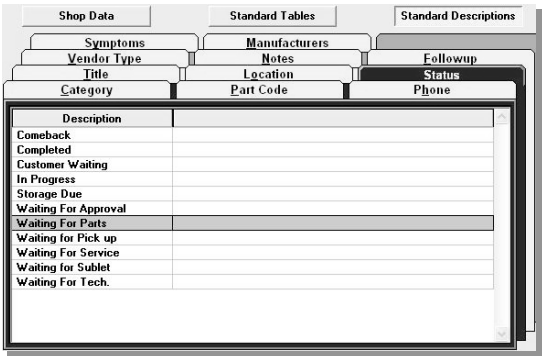


Note:
Program comes with a list of Location descriptions. This will be an item on your Get Ready checklist.

Status

Status allows you to maintain a common set of repair status descriptions. These are handy for the service writer or manager when customers call about their vehicle.

You may add/edit/delete these as you wish at any time. Add **Comeback** so you can note these on your Work-In-Progress screen.



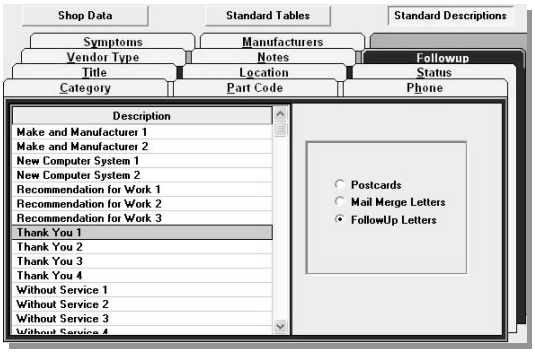
Note:
Program comes with a list of Status descriptions. This will be an item on your Get Ready checklist.

Follow-up (Postcards, Letters and Mail-Merge)

Follow-up allows generation of Postcards and Letters, even Mail-Merge letters so you can send out reminders, recommendations and announcements to all of your customers.

Program comes with sample Follow-up Postcards and Letters, which you may add/edit/delete.

Refer to your *User's Guide* for more detailed information.

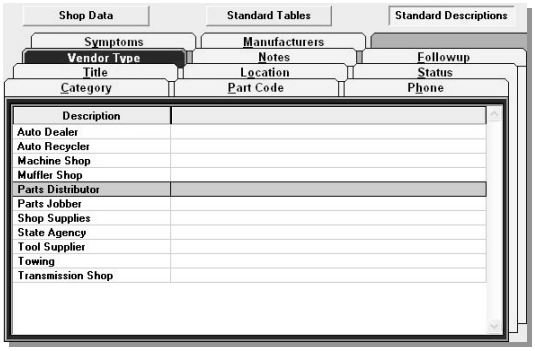


Note:
MS Mail Merge requires Microsoft **Word97 or newer**. Refer to User Guide for further documentation.

Vendor Type

Vendor Type descriptions are used to identify the vendors supplying parts and services to your business. Vendor Types are general headings, not the specific vendors from whom you buy parts.

You may add/edit/delete these as you wish. Please enter examples of your own Vendor Descriptions currently used at your place of business.

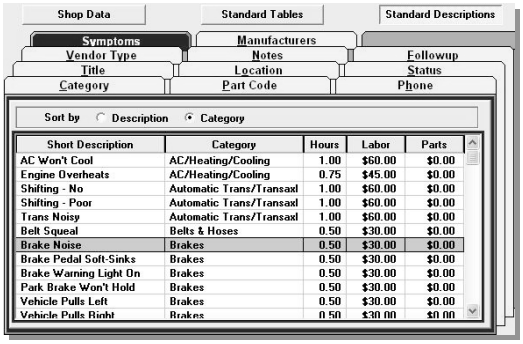


Symptoms

Symptoms can save shops many keystrokes when estimating.

With Symptoms, you're speaking the customer's language right away, making it easier to receive the vehicle and standardize your labor charges. Uses a Symptom now and then apply it to a costlier repair. It also curbs the habit of giving diagnostic time away.

Note: You may also add these on the fly with the Order Screen Symptoms button.



Add your own Symptoms below or directly into your program.

Symptoms Descriptions	
Short Description: **Symptom:** **Work Requested:** **Category:** **Charged Hrs:** **Labor Total $:** **Estimated Part $:** (optional)	**Short Description:** **Symptom:** **Work Requested:** **Category:** **Charged Hrs:** **Labor Total $:** **Estimated Part $:** (optional)
Short Description: **Symptom:** **Work Requested:** **Category:** **Charged Hrs:** **Labor Total $:** **Estimated Part $:** (optional)	**Short Description:** **Symptom:** **Work Requested:** **Category:** **Charged Hrs:** **Labor Total $:** **Estimated Part $:** (optional)

Program Security

This allows the shop owner or manager to password protect sensitive information. For example, most shops don't want technicians knowing how much the shop pays other technicians or marking up parts & sublets.

The Program Security feature allows the shop owner/manager to specify who can delete orders or payments, see (**F12**) Profit Wizard, review Technician pay, etc.

Master password is for owner/managers and lesser password levels for employees. For a detailed description of Program Security, consult the User's Guide.

Note:
If you enter or change the master password, **be sure to write it down** for later reference.

Promotions: Packages & Discounts

Packages are parts and labor operations which are grouped together and sold for a (usually discounted) single price. These 'vanilla' packages transfer as single line entries. You may optionally add the parts & labor details later, but customers will still see only a single line on the invoice that you created in Package setup.

Discounts apply a flat dollar amount **or** percentage discount to the parts and/or labor on an order. For example, you might offer a 10% discount to all AARP members.

Discount appears as line item note on order grid and RED column in running totals. Packages and Discounts are applied via the **Promotions** button on **Order** screen.

Go to Setup, select Packages & Discounts, and select Discounts or Packages tab. Then use Add/Edit to modify entries as desired.

Promotions: Tire Packages

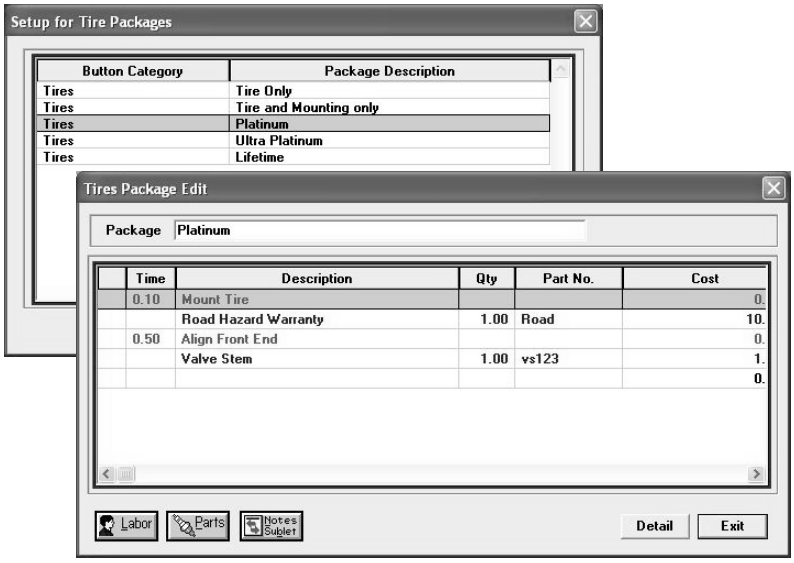
Tire Packages are groupings of tires and additional parts and labor operations to create packages of varying levels.

To add or edit a Tire Package, select Tire Packages from Setup menu and then **Add/Edit** in Tire Packages Edit dialog box.

Program comes equipped with sample packages for Tire Only, Tire and Mounting only, Platinum, Ultra Platinum, and Lifetime packages. Edit these packages as desired.

Please note that any additional taxes or disposal fees may be created at the Tire Package level or individual tire part records.

This setting insures that part record appears within tire selection list.



Tire Packages are applied to orders via **Promotions** icon on Order screen.

For a detailed description of setting up and applying Tire Packages, consult the User's Guide, Self-Instruction Guide, Help [F1], or Training Videos.

Promotions: Brake Packages

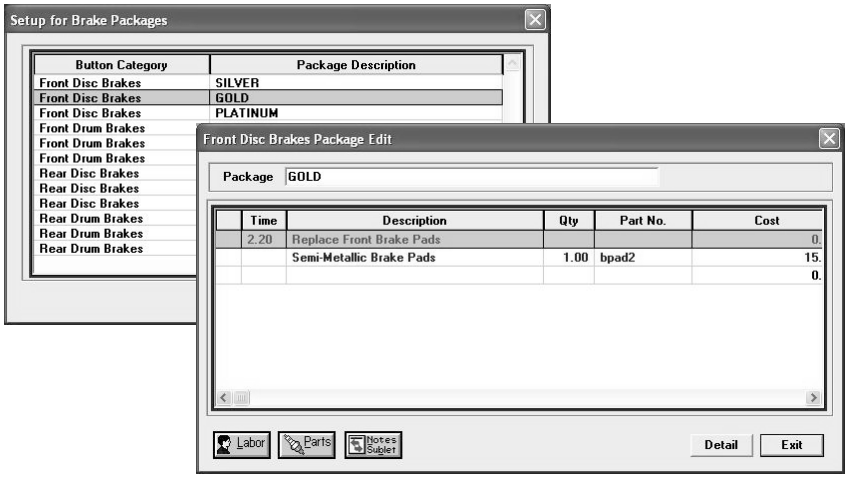
Brake Packages are groupings of brake part and labor operations to create packages of varying levels to offer to your customers.

To add or edit a Brake Package, select Brake Packages from Setup and then **Add/Edit** in Packages Setup dialog box.

Program comes equipped with sample packages for Silver, Gold, and Platinum in combination with Front and Rear brakes. You can edit these packages as desired.

Please note that these are generic or representational parts that will need to be replaced with specifics on the order.

Brake Packages are applied to orders via the **Promotions** icon on the Order screen.



For a detailed description of setting up and applying Brake Packages, please consult Users Guide, Self-Instruction Guide, Help [F1], or Training Videos.

Promotions: Lube, Oil & Filter Packages

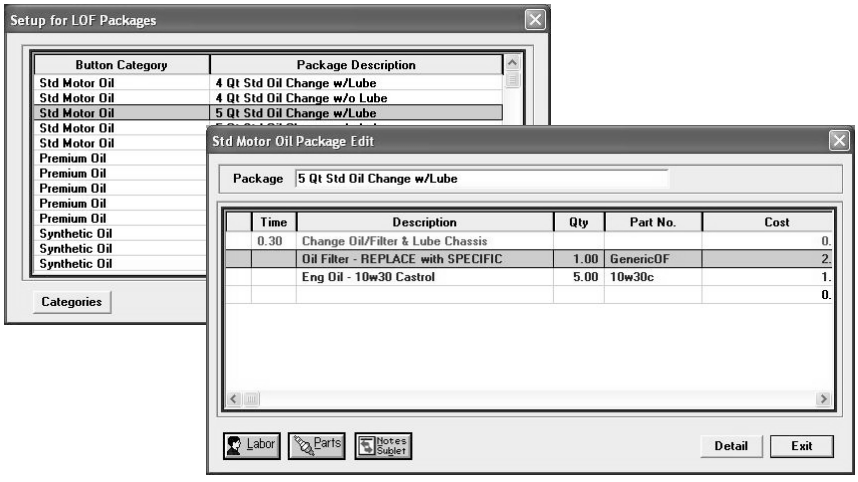
Each **LOF Package** is a grouping of fluids, parts, and labor operations to form pre-built combinations to save input & selection time.

To edit a LOF Package, select Lube, Oil & Filter Packages from Setup, pick a package and then Edit in Packages Setup dialog box.

Program comes equipped with sample packages for various motor oils in combination with 4 & 5 qt quantities and lube service. Edit these as desired.

Please note that these are generic or representational parts that will need to be replaced with specifics on the order.

LOF Packages are applied to orders via **Promotions** icon on Order screen.



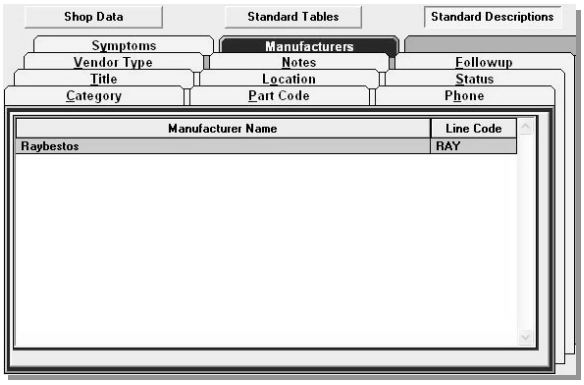
For more information on setting up and applying LOF Packages, please consult Users Guide, Self-Instruction book, Help [F1], Training Videos.

Manufacturers (Line Codes)

Manufacturer's setup allows you to enter Parts Mfg. Line Code information. This option is intended for electronic on-line parts ordering.

This field can also be useful to filter part lookups by Mfg. on Inventory List / Parts List.

You may add/edit/delete these as you wish.

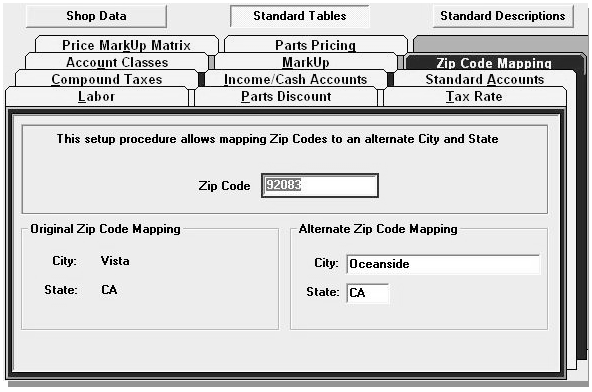


Generally, parts distributors supply a file that fills the Manufacturers Line Code list automatically to match the part lines they carry. These can also be entered manually at any time, if shop is not going to connect electronically.

Zip Code Mapping

Zip Code Mapping allows users to override the zip code database and change the City & State that is filled in when the Zip Code is entered.

Note:
This screen is also used to enter Canadian postal codes.



This completes the Self Setup section; please continue on to Section 3 to go LIVE: Get Ready, Get Set, Go!

Section 3: Get Ready, Get Set, Go LIVE

We recommend you continue working through the following section to be sure that settings are correct and your management system is ready for start date.

GET READY: Confirm Entry of Shop Information

Are We There Yet? Almost.

You've completed all Setup options; now confirm entry of all these real-world settings to make sure your live program is ready. This is not complicated. To ensure it runs as smooth as possible, spend time on this area for best results.

These steps prepare the program to get right to work for your business. They include entering customers & vehicles, technicians, vendors, parts, part kits, canned jobs and reviewing your business information (Shop Data report).

Once these areas have been considered, proceed to the Get Set Checklist.

- **Your Best Customers with All Their Vehicles Entered**
- **All Your Technicians Entered**
- **Your Vendors Entered**
- **Parts in Parts List *(Manager)* OR Inv. List *(Manager Plus)* Entered**
- **Part Kits & Canned Jobs Entered**
- **Your Standard (Institutional) Notes Entered**
- **Any Additional Symptoms Entered**
- **Promotions (Discount Coupons & Packages) Entered**
- **Your Specific Location & Status Information Entered**
- **Double Check Your Program Settings *(see Shop Data Report)***
- **Two Days of Invoices Entered *(excellent practice; real data)***

Note:
Be sure you're using the **live** program for all of these exercises. If it says Demo at the bottom of your screen, exit demo and click on Program icon.

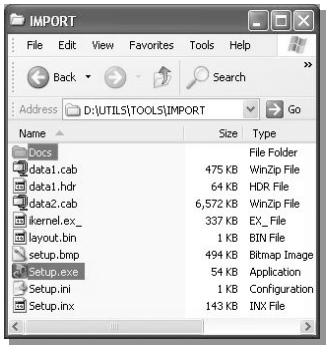
Enter Customers & Vehicles

With this information in place, you'll see improved shop workflow right away. If typing is not your favorite task, you may want to consider hiring someone to enter it for you. The Shop Management Entry Screens (included with your Program Installation CD) may be just the answer for a person to enter this data from outside the management program. This can be installed on any PC for input tasks; then transferred to work PC. See below.

How to Enter Customers & Vehicles

1. From within management program
Use the **Utilities**, **Customer Screen** method to enter customers & vehicles. This is explained fully in the Self-Instruction book; review as needed.

2. OPTION: Outside program – Shop Management Entry Screens
For larger input jobs to be performed outside management program, install the Shop Management Import Utility Package. See instructions below.


IMPORT
File Edit View Favorites Tools Help
Back Search
Address D:\UTILS\TOOLS\IMPORT Go
Name Size Type
Docs File Folder
data1.cab 475 KB WinZip File
data1.hdr 64 KB HDR File
data2.cab 6,572 KB WinZip File
ikernel.ex_ 337 KB EX_File
layout.bin 1 KB BIN File
setup.bmp 494 KB Bitmap Image
Setup.exe 54 KB Application
Setup.ini 1 KB Configuration
Setup.inx 143 KB INX File

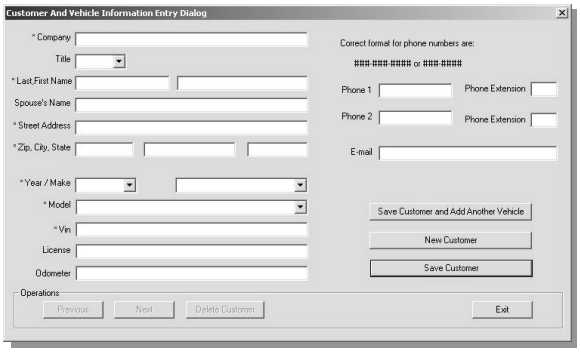
Import folder on install CD

*NOTE: Docs folder (above) has **import.pdf** reference guide for further details on functions.*

1. Insert management program install CD
2. Navigate to D:\UTILS\TOOLS\IMPORT *(example shown at left)*
3. Double-click **Setup.exe**; select to install input screens & import utility.
4. Once installed, go to Start, Programs, find Mitchell Repair group to activate

*1. Start **Entry Screens.exe** here*

*2. Select **Customers** Option*



3. Enter Customers and Vehicles Here

Enter Your Technicians

Know Your Job Profitability: To get the benefit of Profit Wizard's ability to check job profitability, costs (parts, sublet and technician labor) must be complete and accurate. Use **Setup – Technicians Setup**.

Enter Your Vendors

When adding parts to estimates and orders, you want your Vendor names to appear on the Vendor drop-down menu. The program does NOT allow typing in this field during part entry, so Vendors should be entered now. Parts entry will go much faster. Use **Setup – Vendors Setup**.

Purchasing and Inventory. The PO system (Manager Plus only) allows for tracking by vendor.

Warranties and Returns. Using Vendor List helps you keep track of who you bought parts from for warranty purposes, part returns & core charges.

How to Add Vendors

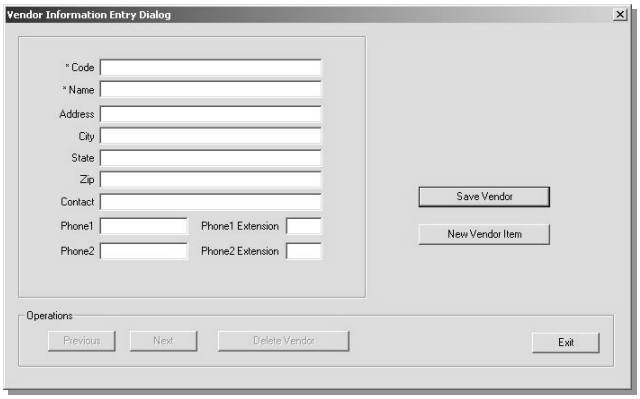
1. From within management program
Use the **Setup**, **Vendor Setup** method to enter vendors.

2. OPTION: Outside program – Shop Management Entry Screens
For input jobs to be performed outside management program, install Shop Management Import Utility Package. See details under Enter Customers.

*NOTE: Docs folder (install CD) has **import.pdf** reference guide for further details.*

*1. Start **Entry Screens.exe***

*2. Select **Vendor** Option*



*3. Enter **Vendors** Here*

Enter Your Parts into Inventory List / Parts List

Every time you create an estimate or order, you save time by not having to enter parts information over and over again. Start with the parts you use most often, such as those listed in the table below.

Oil Filters	**Trans. Fluid**	**Spark Plugs**	**Engine Oil**	**Air Filters**
Batteries	**Tires**	**Belts**	**Hoses**	**Coolant**

You can always add other parts on the fly, but to save time you should enter as many as possible before going live. This will reduce effort.

How to Enter Parts

1a. From Within Manager Plus program

Use the **Inventory, Inventory List** method to enter parts.

1b. From Within Manager program

Use the **Utilities**, **Parts List** method to enter parts.

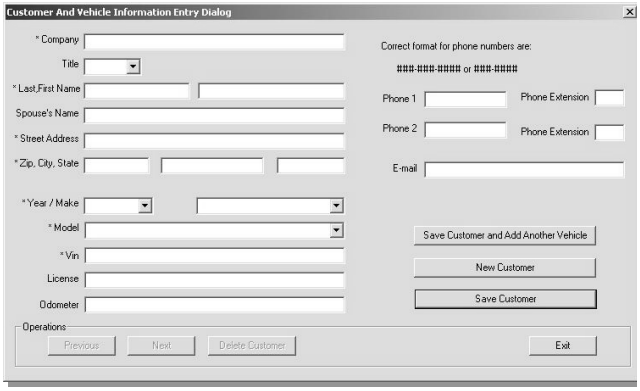
2. OPTION: Outside program – Shop Management Entry Screens

For input jobs to be performed outside management program, install Shop Management Import Utility Package. See details under Enter Customers.

*NOTE: Docs folder (install CD) has **import.pdf** reference guide for further details.*

*1. Start **Entry Screens.exe***

*2. Select **Inventory** Option*



*3. Enter **Parts** Here*

Build Your Own Parts Kits

Every time you use a Part Kit, you're adding multiple parts to an estimate or order with a single selection. Program can also be set to prompt you for certain parts within the Parts Kit that aren't used each and every time.

Bundled Price option is where user creates new selling price. The parts may add up to $25.62, but clicking Bundled Price allows entry of $24.95.

Some common examples of parts kits are provided below:

Clutch Kits	**Brake Kits**	**Oil Change Kits**	**Tune-Up Kits**

Build Your Own Canned Jobs

Every time you use a Canned Job, you're handling pre-built parts and labor operations for your most common jobs with a few clicks. You'll appreciate not having to re-key or transfer individual items every time. You may build a Canned Job with any combination of Parts, Parts Kits, Labor, Sublet, Notes, etc. Any kind of repair order you can put together can become a Canned Job. Are you thinking "We don't have any Canned Jobs?" There's probably a list near your Service Desk.

A/C Recharge	**Inspections**	**Diagnostics**	**Tune-Ups**
State Inspections	**Cooling Flush**	**Alignment**	**Tire Repair**

Enter Your User Notes

***Less Typing*.** You can store and reuse many reminders, warnings, specials, even some "we appreciate your business" type messages. No more taking time to dash off a handwritten note about a vehicle hazard or missing a chance to inform your customer.

Each User Note includes a short title field to confirm you've got the right note and the main body message that will print on your estimate, order or invoice. NOTE: If you press F2, the program will check your spelling.

Enter Your Additional Symptoms

Symptoms Make Program Better Suited to Receiving Incoming Vehicles. Customers bring in vehicles because they have observed one or more problems. By having a Symptoms list, it makes it easier to receive the vehicle and get started on diagnosing the problem and later recommend more specific repairs. And because you are working with standardized labor charges, there's no guesswork or giving away shop labor.

We recommend entering any general Symptoms you may repeatedly use. This is very helpful in keeping multiple service writers aware of what the other is doing.

Enter Your Promotions (Discounts & Packages)

Program now includes specific Tires, Brakes & Lube, Oil and Filter package areas. If you decide that these more specific Promotions better fit the way you do business, refer to the Program User Manual and the Program Self Instruction Guide for more information.

Progressive repair shops know that it takes flexibility to stay on top of business. By having discount coupons and packages (specials) ready, they can satisfy needs more quickly. We recommend entering any Promotions you may use repeatedly.

Enter Your Location & Status Descriptions

Nobody Knows Your Business Like You Do. No one else has the exact same locations (stalls, parking, etc.) that you have. You may use different Status (ready, waiting on parts, etc.) comments at your shop than those provided with the program. Why not customize the program further to match how you do business?

We recommend entering all Location and Status information. This is very helpful in keeping multiple service writers aware of what others are doing.

Double Check Your Settings

For the same reason you wouldn't let a customer take a vehicle without taking it for a test drive, you need to be sure *your* settings are correct right from the start. We'll print a report with details about your program, such as settings and defaults. These save time by automatically entering the most used values. Be sure all program defaults are set properly first!

Printing the Shop Data Report

Step 1 - Click on the **Reports** icon, select the **Management** tab

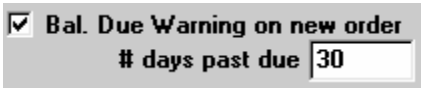
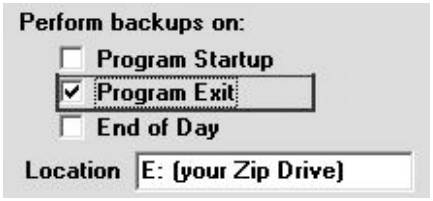
Step 2 - Double click on **Shop Data Report**; program prepares the report for printing. If default Print to Screen is on, it will appear as screen preview first. Click Printer icon to create hard copy, or click 'X' to close.

Reviewing the Shop Data Report

Step 1 - Since this represents how defaults are set, please look it over very carefully. Are the right program options switched on? This data will appear on ALL paperwork, so it's crucial to be correct before you begin.

Step 2 - For changes, proceed to **Shop Data Setup** or **Standard Tables**.

Step 3 - Some additional options (**Shop Data/Default Settings**) do NOT appear on this Report. Since they also impact the program, please consider:

Shop Data Defaults	Description
	Balance Due Warning box displays when a new order is started for any customer with overdue balance. Select # of days.
	Check this to estimate with taxes. **Note:** If HazMat and/or Shop Supplies defaults are set to ON, they will be applied too.
	This setting triggers a prompt to copy your database and program settings files to a backup location when you answer **Yes**. It is possible to select one, two or all three settings. The Iomega® ZIP® drive or USB flash drive is recommended for backup. Just enter the path (drive letter only; E:) to your backup drive in Location.

Enter 2 Days of Invoices

Become even more comfortable, while learning how program works. Since these are paid orders, you may enter them as Invoices. If you want some additional practice, enter them as Estimates or Repair Orders and then run them through the cycle to end up as Invoices. Remember to add any Recommendations and Revisions for any services not already performed.

We're also going to recommend some reports to print, so having two days worth entered will provide the means for comparison. Read through all the steps below before entering invoices.

Entering the Invoices

Step 1 - Enter one of yesterday's invoices, but DON'T Apply Payments or Post it yet. Start by entering new or existing customer & vehicle then enter all the items that were on the order. (If you need help, refer to the Self Instruction Guide.) Be sure to assign technicians to all parts & labor.

Step 2 - Click on **Options**, select **Check Profit**. Are profit percentages in line with your expectations? We recommend average 40% profit margin as a target. If any profit values are too low or too high, you need to find out why before going live.

If the profit on the parts appears low, check markup values. If the profit on labor seems too good to be true, maybe you forgot to assign a tech. Maybe it's just this invoice, but you need to be sure it's not a system setting. We recommend repeating the process with several invoices.

The best tool for any order where numbers don't look right is the Order Detail Report. With the Invoice on screen, hold down Control key (**Ctrl**) and press **F10**. This detailed report can be previewed on screen, showing how program came up with those numbers. NOTE: We recommend this report (includes Tech wages) be password protected in Program Security.

After ALL Invoices have been entered:

Step 3 - Click on **Reports**, select the **Accounting** tab.

Step 4 - Double click on any of these recommended reports:

Category Profit Summary Report	**Invoice Profit Summary Report**	**Posted Order Report**

Print separate reports for each of the two days and compare the totals.

Step 5 - Set dates in Date Range box to match your invoices, click **OK**.

GET SET: Final Countdown LIVE Checklist

Confirm These Program Areas Are Ready For LIVE Operation

❑ Shop Data (Company Info)	❑ Notes
❑ Your Customers and Vehicles	❑ Category List
❑ Tax Rate	❑ Part Codes
❑ Discount Table	❑ Additional Symptoms (if any)
❑ Income/Cash Accts (payment types)	❑ Location & Status Descriptions
❑ Labor Rate	❑ Discount Coupons
❑ All Technicians	❑ Packages
❑ Your Vendors	❑ Tire Package Adjustments (if any)
❑ Inventory (or Parts List) Parts	❑ LOF Package Adjustments (if any)
❑ Shop Supplies & HazMat	❑ Brake Package Adjustments (if any)
❑ Part Kits	❑ End of Day Reports
❑ Canned Jobs	❑ Validations
❑ Markup Matrix	❑ Disclaimers
❑ Markup (Sublet, Parts & Labor)	❑ Reports & Printers
❑ Screen View	❑ Program Security

Confirm These Final Steps Have Also Been Completed

❑ General Ledger Codes Have Been Considered, Changed or Left As Is	❑ Any Compound or Excise Taxes Have Been Calculated and Entered
❑ Checked out all Program Default Settings with Shop Detail Report	❑ Entered two days of Invoices to Confirm program values and any changes to your business processes

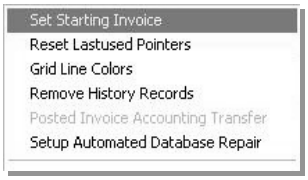
Note:

Be sure you're using the **live** program for all of these exercises. If it says Demo at the bottom of your screen, exit demo and click on Program icon.

GO: Set Starting Invoice

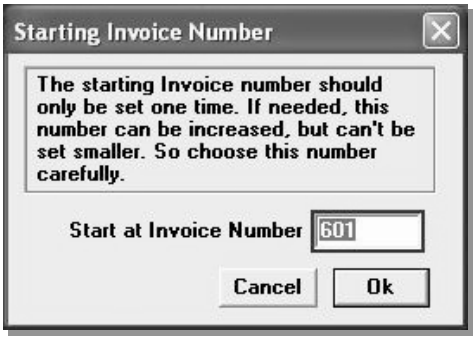
Before you start, you must go to Special Maintenance to set your starting invoice number. While there, you may also consider changing grid line colors to provide more contrast on WIP or Order screens.

Special Maintenance – Set Starting Invoice displays dialog box for entry. Once you've entered this number, future Invoices advance sequentially from that number upward. For example, if you want to begin with Invoice #100, you'd enter starting invoice number 99 here to start.



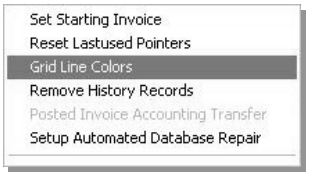
Once you set a starting invoice number in your live program, you can't go back and enter a lower number.

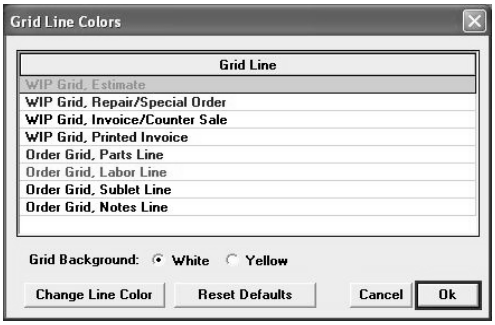
Generally, this is only performed once, before going live. We highly recommend doing this last.


Starting Invoice Number
The starting Invoice number should only be set one time. If needed, this number can be increased, but can't be set smaller. So choose this number carefully.
Start at Invoice Number
601
Cancel
Ok

OPTIONAL: Special Maintenance – Grid Line Colors for changing line colors.

Grid Line Color Settings make selected items more visible with greater contrast on either the WIP or Order screens. Please note that <u>everyone</u> on Users List will all use the same grid line colors.





NOTE: *This menu is activated from program's main color splash screen ONLY*

You are now ready to go live with Manager/ManagerPlus!

Congratulations!

If you've successfully completed the following:

- Teach Yourself Manager (book 2 DEMO)
- Putting Manager To Work book (book 3 LIVE)

You're now ready to start using your Mitchell1 Manager / Manager Plus program. Your business will be far more efficient, profitable and daily work life just got better for everyone.

Thank you once again for your Mitchell1 purchase.